



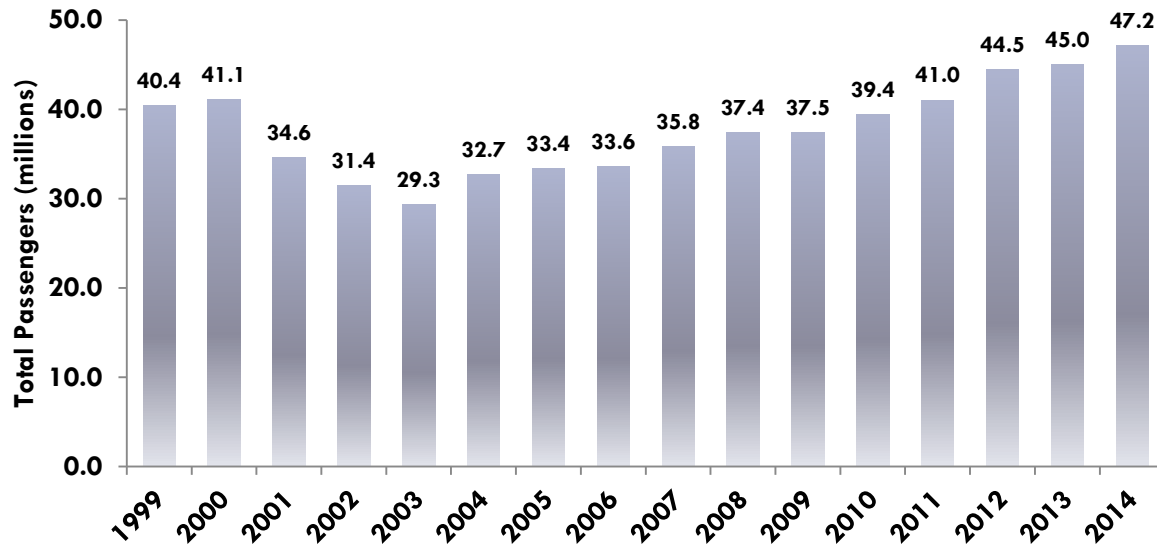
SFO

# SAN FRANCISCO INTERNATIONAL AIRPORT

High-Speed Rail Authority

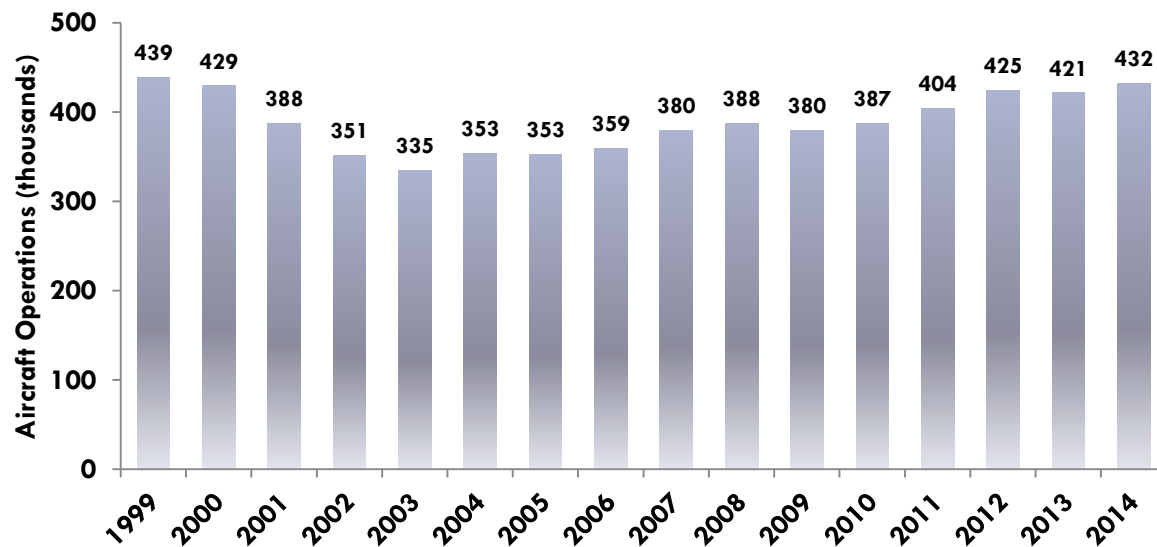
April 2015

# Strong Air Traffic Growth



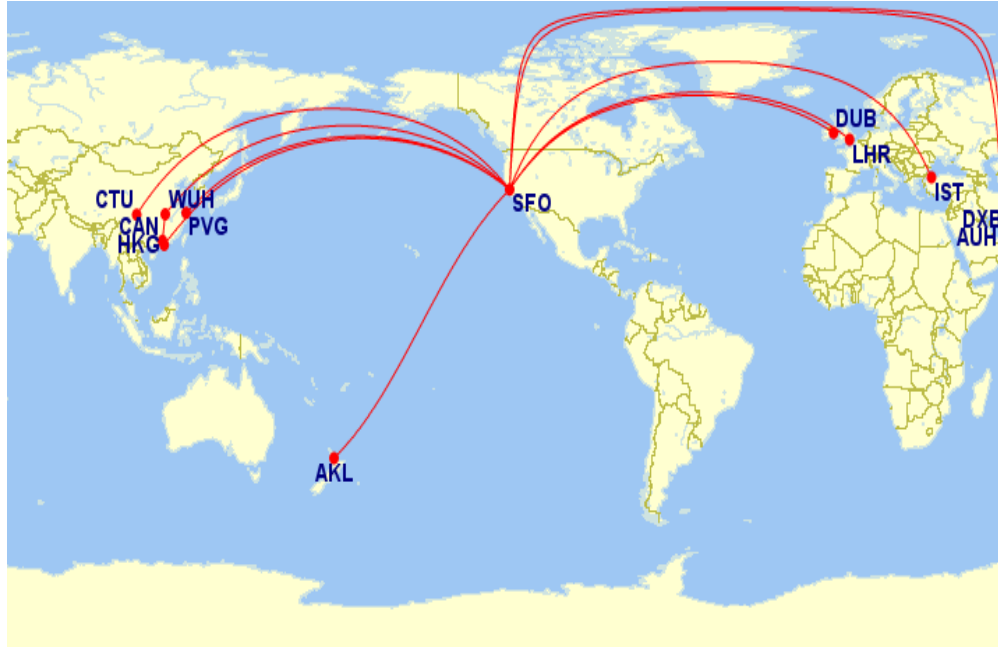
- SFO Passengers are at historic high levels.

- Passenger growth averaged 4.4% annually since 2003.



- Total Aircraft Operations are increasing, but have not surpassed the previous record set in 1999.

# Expanding International Service

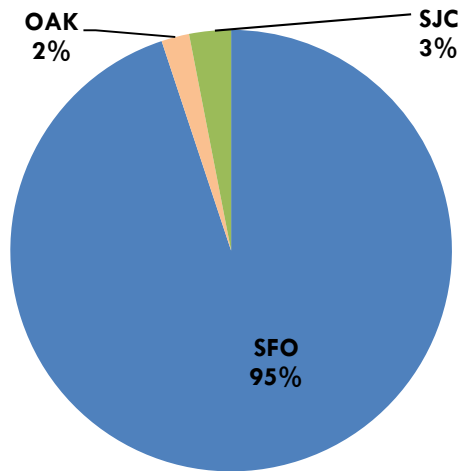


Recent additions of international service result in an 11.3% increase in international seat capacity in 2015

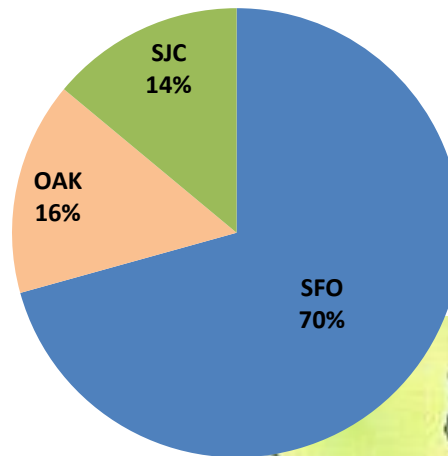


# Bay Area Airports Market Share and Growth

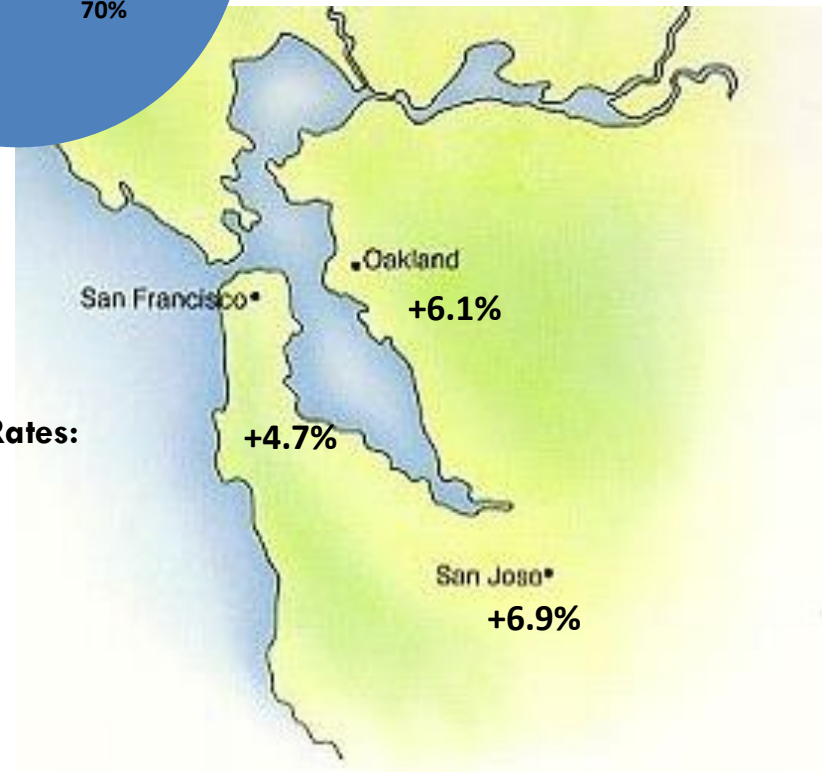
**International Market Share in 2014:**



**Overall Market Share in 2014:**



**2014 vs. 2013 Passenger Growth Rates:**



# California High Speed Rail Corridor



## % of Passengers Traveling Between:

	SFO	OAK	SJC	Bay Area Total
LA Area*	11.6%	33.7%	30.5%	18.1%
San Diego	3.6%	8.3%	7.8%	5.0%
Bakersfield	0.1%	-	-	0.1%
Fresno	0.2%	-	-	0.1%
Modesto	0.1%	-	-	0.0%
Sacramento	0.3%	-	-	0.2%
<b>Total %</b>	<b>15.7%</b>	<b>42.0%</b>	<b>38.3%</b>	<b>23.5%</b>

\*Includes LAX Airport, Burbank, Long Beach, Ontario and Orange County

Note: Columns may not total due to rounding



# California High Speed Rail Corridor



## % of Aircraft Operations Between:

	SFO	OAK	SJC	Bay Area Total
LA Area*	13.7%	35.7%	33.9%	20.4%
San Diego	3.7%	8.2%	7.2%	5.0%
Bakersfield	0.4%	-	-	0.2%
Fresno	0.7%	-	-	0.5%
Modesto	0.2%	-	-	0.2%
Sacramento	1.3%	-	-	0.9%
<b>Total %</b>	<b>20.0%</b>	<b>44.0%</b>	<b>41.1%</b>	<b>27.1%</b>

\*Includes LAX Airport, Burbank, Long Beach, Ontario and Orange County

Note: Columns may not total due to rounding

# Impact of shifting Air passengers to Rail

- By 2035, 2.4 million annual air passengers from SFO could shift to HSR; this would result in a reduction of 3.7% of total passengers
- Also, since the flights to Southern California generally have a lower seat count the diversion to HSR could reduce operations at SFO by 5.3% in 2035.

# Terminal 1 Redevelopment Program



## ➔ Terminal 1 Redevelopment Program

- \$2.4 billion project budget, \$1.1 billion over next five years
- Complete modernization of Terminal 1 and Boarding Areas B and C





# Terminal 3 Redevelopment Program

## ➔ T3 Improvements

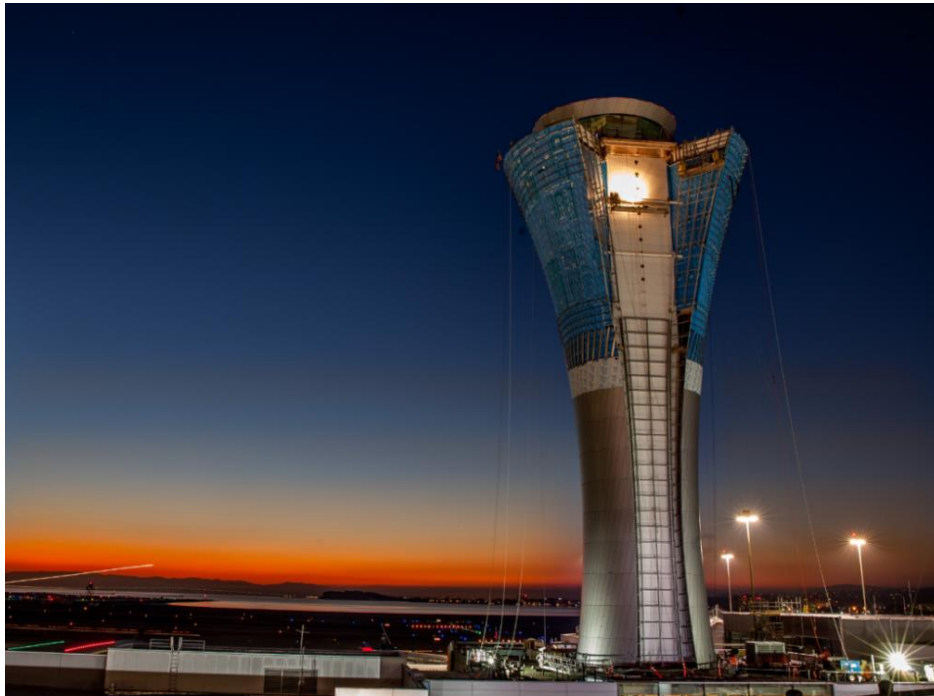
- Program Budget – \$825M
  - T3 East – \$245M
  - T3 West – \$340M
  - BA F Plaza – \$48M
  - BA F – \$195M



# Air Traffic Control Tower (ATCT) Replacement

## ➔ ATCT Replacement - \$144M

- New ATCT, secure connector, demo of existing ATCT, integrated facilities



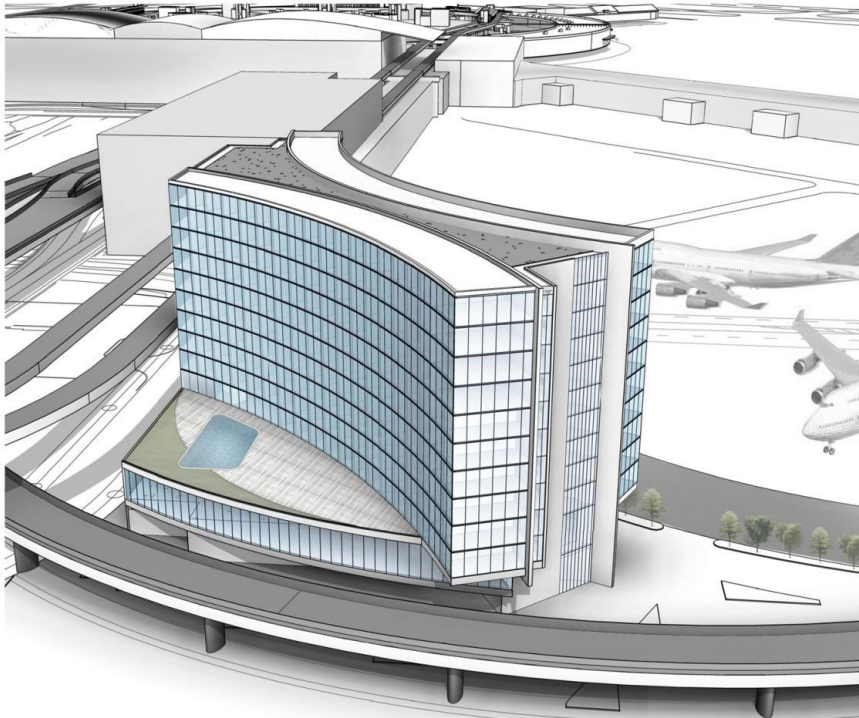


# Airport Hotel



## ➔ \$165M On-Airport Hotel

- Luxury 4-star brand hotel
- Approximately 350 rooms
- New AirTrain station



# Groundside Projects



## ➔ \$110M AirTrain Extension

- Extend AirTrain to Long-Term Parking from Rental Car Center



## ➔ \$72.0M Long-Term Parking Garage

- Additional 3,100 spaces





# SFO Overview



## LEGEND

-  SFO AirTrain Alignment
-  BART Alignment
-  Caltrain Alignment



# Questions?

